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The Danger of Regional War in the Middle East

Israel's campaign in Gaza in response to Hamas's 7 October 2023 attacks still overshadows Middle East politics, with the spectre of wider war or other regional instability ever present even as ceasefire talks appear to be making progress. Crisis Group experts offer a 360-degree view.

The war in Gaza between Israel and Hamas has dramatically raised the temperature in the Middle East. Popular anger is rising. Egypt and Jordan fear the expulsion of Palestinians into their territories. Non-state actors in the Iran-led "axis of resistance" have carried out attacks in response, professedly in support of Hamas and the Palestinian cause more broadly. They have hit Israel and U.S. military targets, as well as shipping in the Red Sea and Gulf of Aden, with rockets and drones. Israel, the U.S. and the UK, in turn, have struck back at these groups. Only a ceasefire in Gaza holds the promise of a regional de-escalation. President Biden's comment that he believes there will be a ceasefire by 4 March, a few days before the start of the holy month of Ramadan, offers some reason for hope.

The high-intensity sparring between Iran-backed forces, on one hand, and the U.S. and its allies, on the other, has caused military and civilian casualties. It has not precipitated a larger confrontation involving Iran itself only because both Washington and Tehran have signalled

that they do not want such a head-on clash. Yet the apparently inadvertent 28 January killing of three Jordan-based U.S. soldiers by an Iraqi paramilitary group sent a warning: it did not set off a wider war, but it could have if not for mutual determination to contain the situation. In an environment of extreme tensions and rapid response times, the next incident may not be contained, especially if it involves larger numbers of casualties, particularly civilian ones, or more U.S. soldiers.

While Israel's assault on the strip persists, the risks of all-out war or other growing instability remain high.

How far a ceasefire in Gaza would go to calm the region is unclear, but while Israel's assault on the strip persists, the risks of all-out war or other growing instability remain high. The mass expulsion of Palestinians from Gaza into Egypt would almost certainly inflame Middle East tensions further, as would stepped-up Israeli military and settler action in the occupied West Bank and East Jerusalem during Ramadan in March and April. Some of the leaders of the Iran-backed "axis" groups have pledged, once a Gaza ceasefire is in place, to return to their pre-war military posture – the status quo ante of 7 October 2023, when Hamas carried out its attack on Israeli towns ringing the Israeli-blockaded Gaza Strip that ignited the war. Whether they would actually do so is unknowable, but there is little doubt that the Gaza war's continuation will continue fuelling the exchanges of fire between Iran-backed forces and the U.S. and Israel, while fanning the popular rage on which these groups feed.

In this 360-degree view, updating previous assessments, Crisis Group takes the pulse of various actors in the Middle East – what moves them, how a ceasefire in Gaza might inform their calculations and how close the region stands to a tipping point.

Israel

Israel's aerial and ground campaign still seems to be far from dismantling Hamas rule and military infrastructure in the strip. Israel has degraded Hamas's capabilities, but it has not achieved a strategic breakthrough, much less forced the group's surrender. At the war's outset, Prime Minister Benjamin Netanyahu promised that Hamas would be destroyed, and he has persistently vowed since then that Israel will not stop until it reaches "total victory". But he has not formulated a path to that end, a workable exit strategy or a realistic day-after scenario for Gaza.

Still deeply traumatised by Hamas's 7 October attacks, Israelis overwhelmingly agree with Netanyahu that the group must be defeated and that the war in Gaza is just. They show little sympathy for suffering of Palestinians in Gaza, and dehumanising language has become part of political discourse. Still, events since the attacks have become entangled in Israel's domestic

political crisis. Netanyahu retains his parliamentary majority, but his popularity is at an all-time low, with more and more Israelis demanding new elections. Many, including his rivals within the war cabinet, fear that Netanyahu is prosecuting the war based primarily on considerations about his own political survival and deflecting responsibility for the intelligence and security failures of 7 October. Meanwhile, the military echelon has warned that without an exit strategy or a day-after plan, the gains of the past months could be lost. Indeed, Hamas has already shown signs of reasserting its power in northern Gaza, in areas destroyed, conquered and then vacated by Israeli forces.

The Israeli government has made no secret of using food and medicine as bargaining chips to force Hamas to release the hostages.

Israel charges that Hamas, the governing authority in the strip since 2007, is diverting humanitarian aid and essential goods, though Israel has not adduced any evidence to support the allegation, as a U.S. official has pointed out. While the amount of aid entering Gaza is much less than needed, many in Israel hold that almost any is too much; they say it sustains militants and gives the Islamist movement leverage over the strip's population even as Israeli hostages languish in captivity. U.S. pressure has led Israel to slightly increase the amount of aid entering the strip, but once it arrives, Israeli restrictions on movement and the breakdown of public order greatly constrain transport and distribution. The Israeli government has made no secret of using food and medicine as bargaining chips to force Hamas to release the hostages.

The government's main dilemma is how to position itself for a possible hostage deal that the U.S., Qatar and Egypt have been working to secure and which, based on President Biden's soft prediction, may soon come to pass. Hamas demands not only the release of many Palestinians in Israeli prisons, but also a staged ceasefire that would end the war with the full withdrawal of Israeli forces from Gaza. By contrast, Israel has signalled it will agree only to a temporary ceasefire to secure the return of all hostages and the remains of those who have died. It intends to maintain an "indefinite" military presence in, around and above Gaza.

Even if, in principle, united around the goal of destroying Hamas, the Israeli public appears roughly split into three. One group is intent on striking a hostage deal, even if the cost is as high as releasing Palestinians involved in the 7 October attack and potentially even stopping the war (because they see freeing the hostages as Israel's utmost responsibility); a second is willing to sacrifice the hostages if that is the only way to achieve the objective of destroying Hamas; and a third group still believes that Israel can both free the hostages and, subsequently, defeat Hamas. The same rifts divide the governing coalition and war cabinet. Meanwhile, the far right's call for the expulsion (through what it terms "voluntary emigration") of Palestinians from Gaza and rebuilding Israeli settlements there is gaining ground and to some degree entering mainstream discourse. Netanyahu has said Israel is not interested in resettling Gaza,

though to remain in power he cannot ignore those in his coalition, including members of his own Likud party, who want Israel to do so. Netanyahu has also asserted that Israel must retain security control of the entire area between the Jordan River and the Mediterranean Sea – in effect declaring a deepening occupation of both the West Bank and Gaza.

The idea of a two-state solution is possibly the farthest it has ever been from Israeli consciousness.

Little support is evident among Israeli politicians or the public for efforts to reach a wider political settlement with Palestinians. The U.S. government favours a phased end to the war that opens the way for a political track including normalisation of relations between Israel and Saudi Arabia and offering concessions to the Palestinians, including placing a restructured Palestinian Authority (PA) in Ramallah in charge of Gaza. Netanyahu has rejected the latter proposal, and he may end up also nixing a hostage deal altogether if it would mean the demise of his coalition, as the far right has threatened to quit over any step toward a Palestinian state. Netanyahu has said foreign nations recognising a Palestinian state in the aftermath of 7 October would be rewarding terrorism, and he won the support of the vast majority of the Knesset in a declaration opposing unilateral recognition of a Palestinian state. The idea of a two-state solution is possibly the farthest it has ever been from Israeli consciousness, because Israelis are focused inward on their own trauma, on protecting themselves and on their internal discord.

As the talks over a ceasefire have dragged on, Israel has intensified air and artillery strikes on Rafah, the remaining urban area to which most Palestinians in Gaza have fled. Israeli forces may also deploy along the border between Gaza and Egypt, exacerbating what is already a humanitarian catastrophe and possibly precipitating mass Palestinian flight into Egypt's Sinai desert, which would further destabilise the region. Israel has insisted that it must invade Rafah to finish off the Hamas battalions there, saying Palestinians would be able to evacuate northward in the strip. Benny Gantz, a member of Netanyahu's war cabinet, named the Muslim holy month of Ramadan (which begins on 10 March) as a deadline for Hamas to release all the Israeli hostages it is holding in Gaza or face a ground operation in Rafah.

Hostilities on the frontier with Lebanon continue unabated, though within certain limits. Some weeks ago, some Israeli politicians had warned that, after Hamas's 7 October attacks, Israel could no longer tolerate a hostile militant force – the Shiite party-cum-militia Hizbollah – on its northern border. At the same time, Israel has consistently signalled interest in reaching a diplomatic solution with Hizbollah – that would, in essence, involve Hizbollah pulling back forces from the border – while keeping the window open for an extensive military operation in Lebanon that could be far more destructive than the Gaza war for both Lebanon and Israel. Still, no diplomatic fix is possible while the war in Gaza continues. Some 80,000 Israelis remain

displaced from their homes in the north, and it is unlikely that they will be able to return safely without a Gaza ceasefire.

Israeli army and settler violence in the West Bank has spiked since 7 October, and it could spill over into Jerusalem during Ramadan in March and April, especially if Israel restricts Palestinians' access to the al-Aqsa mosque on Jerusalem's Holy Esplanade, as it has discussed doing. Israel has kept the West Bank under strict lockdown and prohibited most Palestinians who normally work in Israel from entering, exacerbating economic distress. Meanwhile, Palestinian attacks on Israelis in both the West Bank and inside Israel are on the rise. Whether a Gaza ceasefire improves things in the West Bank will depend on Israeli politics, as this government is intent on maintaining and even strengthening its hold on a territory it has occupied for the past 56 years.

Palestine

As the Gaza war continues, the situation in the occupied West Bank is deteriorating rapidly, raising fears of greater instability. Army raids and settler attacks are on the rise, as are fatalities among Palestinians. Settlers are scaring villagers from their homes, taking over their lands and herds, often in collusion with Israeli forces. The situation of refugees in the West Bank is also worrying. Should UNRWA, the UN agency responsible for Palestinian refugees, be forced to cut its services as a result of a number of its donors suspending or ending their financial support, as has become a real possibility, security in the West Bank will almost certainly worsen, as refugees formerly dependent on the agency for their survival will see their livelihoods suffer. Social unrest could be the result. Ramadan may bring further violence, if the experience of past years is any guide.

Israel has kept the West Bank under siege, in effect, since the 7 October Hamas attack, blockading Palestinians inside their cities, towns and villages. These measures have caused an economic meltdown in a territory of 3.2 million people. They have also further eroded the PA's standing, raising ever more pointed questions about whether it can survive.

Since 7 October, Israel has withheld $257 million in tax revenues it owes the PA, deepening its fiscal woes. The Israeli cabinet has reportedly agreed to send the accumulated monies to Norway, which would hold them in trust until Israel approves their disbursement to the PA. So far, however, Israeli Finance Minister Bezalel Smotrich, a far-right politician who adamantly opposes cooperation with the PA, has refused to sign off on the transfer to the Norwegian government. Norway has warned that the PA may collapse without the money. Even if the deal goes through, the PA would be prohibited from spending any of the funds in Gaza, where it pays the salaries of civil servants in the Hamas-led government.

Backing for Hamas, which many see as embodying resistance to the Israeli military occupation, has tripled [in the West Bank and Gaza].

The PA, which was already deeply unpopular before 7 October, has thus lost even more support, while backing for Hamas, which many see as embodying resistance to the Israeli military occupation, has tripled. Some 88 per cent of respondents in a recent survey in both the West Bank and Gaza declared they wanted President Mahmoud Abbas to resign. Abbas at first condemned the 7 October attacks, but a public backlash quickly forced him to temper his words. In December, Hussein al-Sheikh, Abbas's deputy and secretary-general of the Palestine Liberation Organisation (PLO), stated that he opposed armed resistance to the occupation, calling upon Hamas to reconsider its strategy. Sharp criticism soon compelled him, too, to make an about-face. Abbas publicly rejected the notion that the PA would assume immediate governance responsibilities in a post-war Gaza, but the U.S. is pressuring him to reconsider. Arab states are keen for the PA to play a role in Gaza, but they show less enthusiasm about Abbas remaining at the helm.

As the war in Gaza grinds on, senior PA officials have for the first time started to openly muse about a future without Abbas, who undermined rivals to consolidate power during his now nineteen-year tenure. In discussions about the "day after" in Gaza, Abbas has tried to pre-empt any move within PA circles to erode his standing through intra-Palestinian reconciliation. He has prohibited top-tier members of his Fatah party from engaging in direct talks with Hamas. Before 7 October, senior PA officials had endeavoured to explore options for overcoming the PA's legitimacy crisis, and subsequent events have only made Palestinian political renewal more urgent. Senior politicians in other parties, as well as factions that have defected from Fatah, agree that change is necessary; some are calling for the release of Marwan Barghouti, a prominent Fatah activist serving multiple life sentences in Israel on charges of murder, viewing him as a leader who could reunify the party and build bridges with Hamas ahead of elections. Still, true intra-Palestinian reconciliation does not appear to be a near-term prospect for now. The resignation of the government of Prime Minister Mohammad Shtayyeh on 26 February suggests a mere reshuffle below Abbas and his immediate circle, and will bring no change to the PA overall.

Lebanon

Since 8 October 2023, the day after Hamas's attack, Israel and Hizbollah have clashed repeatedly across the Israeli-Lebanese frontier. From the outset, Hizbollah has framed its cross-border attacks as acts of solidarity with the Palestinian people and Hamas, its beleaguered ally in Gaza. At the same time, it has calibrated them carefully, even when retaliating for Israeli strikes, suggesting that it prefers to avoid an expanded war – a stance that Hizbollah Secretary-General Hassan Nasrallah has also intimated in his speeches. Party leaders have repeatedly

stated, however, that Hizbollah will not stand down unless and until Israel ends its war in Gaza.

In pursuing this balancing act, Hizbollah has faced criticism, including from Hamas; a senior Hizbollah official admitted to Crisis Group that, in the conflict's earliest days, Hamas had hoped for more forceful intervention from its Lebanese ally. Hizbollah has justified its measured campaign to date by emphasising the strategic importance of keeping Israel preoccupied at its northern border, far from Gaza, and forcing the evacuation of at least 80,000 Israelis from their homes in the north.

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While daily border clashes have not escalated into full-scale war, the past few weeks have witnessed the most serious incidents on each side during this round of conflict. In addition to more intense bombing, Israel has increased the number of strikes on key personnel from Hizbollah and its allies. On 2 January, an Israeli strike killed Saleh al-Arouri, Hamas's deputy head, in Beirut's southern suburbs. The killing took place around 100km from the border – well outside the generally accepted zone of conflict – in an area of Beirut where many Hizbollah supporters live. On 8 January, another Israeli operation killed military commander Wissam al-Tawil, the most senior Hizbollah figure to fall since the battle broke out. In retaliation, Hizbollah launched heavy attacks on two key Israeli military sites located deeper inside Israel than most of its earlier targets. On 14 February, after a fatal strike on an Israeli army base in Safed, also far from the frontier, Israel unleashed widespread bombing in southern Lebanon, killing several civilians. Two days later, Nasrallah threatened that Israel would pay "in blood" for the civilian deaths.

Diplomats continue to search for ways to resolve the conflict on the Israeli-Lebanese border, well aware of Israel's threats of greater violence if Hizbollah does not pull back fighters it has stationed close to the frontier since 8 October. Israel demands that Hizbollah comply with UN Security Council Resolution 1701 – which codified an arrangement reached at the end of the parties' last major war in 2006 – and withdraw personnel to areas north of the Litani River. A new negotiated agreement would need to contain guarantees satisfying Israel's demand for greater security, while also addressing the concerns of Hizbollah, which presents itself as the guardian of Lebanese sovereignty all the way to the Israeli border.

Western diplomats have suggested that the parties consider proposals for restoring at least partial respect for Resolution 1701, which both Hizbollah and Israel have repeatedly breached for years. Hizbollah fighters could decamp to areas somewhat farther away from the border, while Israel reduces its regular overflights violating Lebanese airspace. In parallel, diplomats have raised the prospect of kickstarting talks between Lebanon and Israel over their disputed

boundary, known as the Blue Line, which could then encourage negotiations over further steps.

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To complicate matters, Hizbollah has resisted attempts to discuss de-escalation along the border before a ceasefire in Gaza. At the same time, it has indicated that it would cease hostilities immediately in the event of a ceasefire, in effect offering to return to its status quo ante posture.

As Lebanese civilians reel from the war's impact, they remain mostly powerless to shape the decision-making of Hizbollah, which remains the strongest armed force in Lebanon. So far, the border clashes have displaced more than 85,000 residents from the south, while doing profound damage to housing, infrastructure and agricultural assets in the area. Embroiled in an unprecedented economic crisis since 2019, the government was facing an uphill battle in efforts to put the country on the path to recovery even before 7 October; since the latest round of fighting started, it has struggled to secure funding for its emergency plan to cushion the war's socio-economic impact.

For now, Israel and Hizbollah are maintaining a precarious balance along the border. But their self-restraint could come to an end if one – probably inadvertently – hits a populated area, killing many civilians and forcing the other to respond. Whether the sides would then be able to contain the resulting violent escalation is anyone's guess; Israeli leaders may conclude, if the casualties are on the Israeli side, that they have no choice but to decisively deal with the threat that Hizbollah poses.

Should Israel and Hizbollah escalate the conflict to all-out war, as many fear could happen, a countrywide humanitarian disaster would almost certainly ensue. Israel could well launch a ground invasion of southern Lebanon, while also expanding its bombing campaign to targets across the country, as it did in the 2006 war. Again, Israel would likely focus its aerial attacks on areas with large Shiite populations – especially Beirut's southern suburbs and the Bekaa Valley, in addition to southern Lebanon – where Israel charges that Hizbollah stores much of its weaponry among the civilians it claims to represent in the country's confessional politics. Humanitarian agencies are bracing for this scenario, which could see the displacement of one million people in a country whose economy is already on its knees.

Egypt

Tensions between Egypt and Israel have continued to heighten since 7 October. At their core are Cairo's fears about Israeli intentions, including the possibility of pushing Palestinians from

Gaza into the Sinai Peninsula. While these concerns appeared to subside following assurances from the U.S. and other foreign partners, the prospect of a full-scale Israeli ground operation in Rafah, the city closest to Egypt that now hosts over one million displaced Palestinians, has revived them. To deter Israel from considering such steps, Egypt has sternly voiced its opposition to the notion of expelling the Palestinians time and again.

Egypt is also alarmed about the possibility that Israel will move into territory on its border. In December, Prime Minister Netanyahu expressed his intention to take over the Philadelphi corridor, a narrow strip of land that stretches along Egypt's boundary with Gaza, prompting Egyptian officials to warn their Israeli counterparts that reoccupying this area would breach a 2005 agreement that allows Cairo to deploy 750 troops to patrol it. While Israel sees control of this corridor as key to halting the alleged flow of weapons and military equipment into Gaza, for Egypt it is vital for both maintaining security in the Sinai, which has seen a persistent insurgency, and pre-empting a possible forced displacement of Palestinians from Gaza.

Egyptian officials were actively considering suspending the 1979 treaty if Israel staged an offensive in Rafah without first safely evacuating the civilian population within Gaza.

Cairo has gone as far as telling Israel that the mass expulsion of Palestinians from Gaza would compel Egypt to withdraw from the two countries' 1979 peace treaty. In early February, as Israel began preparations to attack Rafah, the foreign ministry warned that it considered "targeting Rafah, and Israel's continued adoption of a policy of impeding access of humanitarian aid, as an actual contribution to the implementation of the policy of displacement of the Palestinian people". Media outlets reported that Egyptian officials were actively considering suspending the 1979 treaty if Israel staged an offensive in Rafah without first safely evacuating the civilian population within Gaza. Foreign Minister Sameh Shoukry partly backtracked shortly thereafter, stating that Egypt will comply with the treaty as long as Israel does, too. Throwing the treaty into question could badly hurt the Egyptian economy, particularly if the U.S. were to stop sending the yearly $1.3 billion aid package that is tied to it.

The threat to withdraw from the peace treaty seems primarily aimed at convincing Egypt's Western allies to enforce their stated red line, while simultaneously extracting major economic concessions from them. Since October 2023, Cairo has confronted both a potential security crisis and an economic one stemming from the Gaza war, which has exacerbated its pre-existing economic predicament and declining diplomatic and military influence in the region. Security-wise, Egypt faces the possibility of a destabilising refugee influx. Economically, it has felt the impact of the Gaza war through lower revenues from tourism, re-exports of Israeli gas (cut by Israel to prevent Hamas from targeting the export infrastructure) and Suez Canal transit fees, reduced by the Houthis' attacks on Red Sea shipping. Yet it has tried to use its centrality in this regional crisis and its acknowledged vulnerability therein to improve its position. Faced with a

problem of limited resources and clout, Egypt is now trying to leverage the West's fear that the Gaza war could destabilise the Arab world's largest country, with possible repercussions for regional security, irregular migration to Europe and commercial shipping in the Suez Canal. Central to this approach has been Cairo's request for financial support from the International Monetary Fund and the European Union, as well as U.S. help in preventing the expulsion of Palestinians from Gaza.

The gambit, which has paid off so far, could come under severe pressure if an Israeli ground operation in Rafah goes ahead. Over the past months, Western policymakers have echoed Egypt's opposition to forced displacement and signalled their willingness to provide extra financial aid. Yet the forced displacement scenario continues to trouble Egypt. Cairo has pinned its hopes on the idea that the U.S. and European governments would be willing and able to contain the Israeli offensive in Gaza. Yet Netanyahu's recent statements suggest that Israel is gearing up for a push into Rafah. An incident prompting a mass exodus of Palestinians into the Sinai could expose Egypt's powerlessness vis-à-vis Israel and erode what support the authorities have among the population.

An influx of Palestinian refugees could strain already limited resources and fuel anti-government protests, possibly pushing the country to the brink of mass unrest.

The conflict in Gaza has resonated deeply in Egyptian society, invigorating grassroots mobilisation through street demonstrations in solidarity with the Palestinians and consumer boycotts of Israeli and Western brands. President Abdel-Fattah al-Sisi has tried to contain this groundswell of support by emphasising both his commitment to the Palestinian cause and the instability that the war could cause in Egypt. An influx of Palestinian refugees could strain already limited resources and fuel anti-government protests, possibly pushing the country to the brink of mass unrest.

For now, Egypt is working to alleviate the humanitarian catastrophe unfolding in Gaza, at least in part to discourage Palestinians from trying to break out of Gaza's confines themselves, and to broker a cessation of hostilities. Since the start of the conflict, Rafah has been the main access point for humanitarian aid arriving in Egypt for Gaza, handling around 100 trucks daily. Egypt now serves as the enclave's main aid conduit, predominantly via Sinai's al-Arish airport. But strict controls imposed by Israel and logistical hurdles, including limited storage capacity at al-Arish, constrain the aid flow, risking spoilage of perishables.

Diplomatically, Egypt has joined Qatar in efforts to end the war. Over the past few years, Cairo has taken a pragmatic approach toward Hamas despite its affinity with Egypt's Muslim Brotherhood, on which Sisi has cracked down mercilessly. Cairo views Hamas as an actor rooted in Palestinian society indispensable for any diplomatic and security arrangement in the area. In

December, Cairo put forward a three-stage ceasefire plan to facilitate the release of hostages in Gaza and Palestinian prisoners in Israel as well as the relocation of Gaza's population to the north of the strip. Talks resumed in January and February, aimed at striking a similar deal that could pave the way for a major de-escalation and a lasting truce. Yet disagreements between Hamas and Israel over the length of the truce, with the former demanding a permanent ceasefire and the latter accepting only a temporary one, mean that efforts have so far proven fruitless.

Jordan

Because of its geographic and demographic proximity to the centre of the crisis, Jordan is trying hard to steer clear of becoming enmeshed in the region's growing instability. Having long been a haven for Palestinians pushed out of their homeland, it is deeply fearful of a new crisis that could send Palestinians across the Jordan River. It has been drawn directly into hostilities related to the Gaza war only once, when an armed drone sent by an Iran-backed Iraqi paramilitary group struck a U.S. observation post, Tower 22, in the desert near Jordan's border with Syria on 28 January, killing three U.S. soldiers. The event has had no further repercussions for Jordan, even as the U.S. responded with a wave of counterattacks on Iran-backed Iraqi militant groups in Syria and Iraq. But it served as a warning that any regional escalation could spill into Jordan. Displays of public anger at the plight of people in Gaza have diminished since the early days of Israel's post-7 October assault on the strip but would likely pick up pace were Palestinians pushed into Egypt.

In solidarity with Palestinians, who make up a large part of the country's population, Jordan's leaders have been vociferous in their condemnation of Israel's military campaign in Gaza. The king and queen have issued numerous strongly worded statements, with the former denouncing Israel's "relentless bombing campaign" in Gaza as "a flagrant violation of international law" and "a war crime". Foreign Minister Ayman al-Safadi has likewise called Israel's campaign a "war crime". He said Jordan would reject Arab involvement in a post-war Gaza, whether in the form of peacekeepers or accepting refugees from the enclave, saying it does not want to be seen as facilitating resolution of a crisis of Israel's own making at the Palestinians' expense. He also called for an immediate, unconditional ceasefire and for Hamas to release all the hostages it is holding. Jordan publicly supported South Africa's genocide case against Israel at the International Court of Justice.

Officials in Amman say Israel's war in Gaza could pose an existential threat to Jordan.

Officials in Amman say Israel's war in Gaza could pose an existential threat to Jordan. The scenario they dread most is the expulsion of Palestinians from the West Bank into Jordan after Israel turns its gaze from Gaza. More new arrivals would upset the precarious political balance between the country's Palestinian residents – who are refugees from the 1948 and 1967 wars – and its East Bankers or Transjordanians. Articulating their fears so explicitly is a departure from

past practice, when Jordan typically adopted a measured tone toward Israeli policies and military actions, in tune with its Western allies' preferences.

The government has come under growing domestic criticism for signing the 2022 U.S.-Jordan Memorandum of Understanding on Strategic Partnership. The agreement gives the U.S. "virtually unlimited rights" to use Jordanian territory for military objectives in return for $10 billion in aid over seven years. Opposition to the accord began building in October 2023, when allegations emerged that the U.S. has been sending military aid to Israel through Jordan, with Jordanians accusing the U.S. of "colonising" their country.

Protests that erupted in October have since died down, partly because security forces suppressed them and possibly also because people have become somewhat inured to the unrelenting media coverage of Palestinian suffering. Yet sit-ins have continued at both border crossings with Israel, with activists attempting to block trucks carrying supplies into Israel that have been rerouted overland from Gulf Arab countries because of Houthi attacks on commercial shipping in the Red Sea.

Iraq

Iraqi armed groups backed by Iran have repeatedly attacked U.S. military assets in Iraq and Syria over the past four months, citing Israel's war in Gaza, occasionally triggering a U.S. response. By and large, both sides seem intent on not crossing presumed red lines. Before 28 January, no U.S. troops had died, and while the U.S. has killed several of the Iraqi groups' fighters, the latter apparently deemed these losses tolerable.

The fragile equilibrium was tested most plainly when one of the groups, Kata'ib Hizbollah, killed three U.S. soldiers in the 28 January drone strike on Tower 22. It is likely that the attack was not intended to kill, as U.S. defensive systems almost routinely down enemy drones, a fact of which the armed groups were keenly aware. The reaction from the groups was indicative: they instantly withdrew from their bases in Syria and western Iraq. The commander of Iran's Quds Force, Ismail Qaani, arrived in Baghdad hours after the attack, seemingly compelling Kata'ib Hizbollah to issue a statement, released on the social media platform Telegram. The group said it was suspending its attacks, citing a desire "to prevent embarrassment to the Iraqi government", which is in negotiations with Washington about whether U.S. troops will remain in Iraq. (Other groups, including Kata'ib Sayed al-Shuhada and Harakat al-Nujaba, vowed to continue.) The statement was a clear signal from Iran that its non-state allies had gone too far in their confrontation with the U.S., even if Kata'ib Hizbollah may not have intended to kill the U.S. soldiers.

The soldiers' deaths led the Biden administration to respond with force amid a political uproar in Washington and charges from its critics that it was displaying weakness. On 2 February, the U.S. military conducted over 80 strikes in eastern Syria and western Iraq, hitting bases and weapons storage facilities belonging to the Quds Force and Iraqi armed groups that are part of

the Iran-backed Islamic Resistance, but also others that are not. All the armed groups – whether linked to Tehran or not – emerged as part of al-Hashd al-Shaabi (Popular Mobilisation) rallied by the Shiite clergy in 2014 to fight the Islamic State or ISIS. U.S. strikes killed seventeen people in two locations in Anbar province, including sixteen belonging to Hashd brigades not part of the Islamic Resistance, as well as one civilian.

Some in Iraq and the U.S. criticised the Biden administration for not directly retaliating against Kata'ib Hizbollah, which was responsible for the Tower 22 attack.

The Iraqi government of Prime Minister Mohammed Shiaa al-Sudani condemned the strikes as an intolerable breach of Iraqi sovereignty, while some in Iraq and the U.S. criticised the Biden administration for not directly retaliating against Kata'ib Hizbollah, which was responsible for the Tower 22 attack. Shortly thereafter, on 7 February, the U.S. attacked a car in Baghdad, killing a senior Kata'ib Hizbollah commander, Wissam Sabir al-Saadi, also known as Abu Baqir, and three of his companions. That incident, in turn, provoked an outpouring of rage among the followers of both the Islamic Resistance and the Hashd, as Abu Baqir was one of Kata'ib Hizbollah's veteran commanders, who had been responsible, most recently, for the group's operations in Syria.

The incident also prompted Kata'ib Hizbollah to reverse its statement suspending operations. Yet the groups have carried out no attack in Iraq since then, and only a few in Syria, clearly under pressure from both Iran and the Iraqi government. While Iran wants to prevent a direct confrontation with the U.S., the Iraqi government needs political space to negotiate the exit of the international forces that are part of the coalition fighting ISIS. That these forces leave is a longstanding request of the Iraqi government, as well as a demand of Iran and the Iraqi political and armed groups it backs. Washington has signalled that it is willing to consider the request but not as long as U.S. troops are under fire. The Tower 22 attack came one day after the Iraq-U.S. Higher Military Commission convened in Baghdad to negotiate the coalition forces' withdrawal. On 10 February, the Iraqi parliament convened a session to vote on expelling U.S. troops, but too few representatives showed up for a quorum. Nearly half the Shiite lawmakers stayed away, indicating widespread reluctance within the governing coalition for a rushed, or any, withdrawal of U.S. troops. Most Iraqi parties, even Hashd members but excepting the three main Islamic Resistance groups, would prefer that U.S. troops stay in order to train Iraqi forces. (The Islamic Resistance groups' main grievance is that the U.S. uses its in-country infrastructure and intelligence capabilities as part of the anti-ISIS coalition to pursue targets other than ISIS.)

The Tower 22 incident shows the risks inherent in the military game being played by the Islamic Resistance and the U.S. in Iraq and Syria, as well as the clear determination of both the U.S. and Iran to keep the tit-for-tat exchanges contained. Yet in this tense standoff, accidents are bound

to recur, and there is no guarantee that efforts to manage the situation will always succeed, particularly if there are larger numbers of casualties on either side.

Syria

Weakened by civil war and Western sanctions, the Syrian regime is the only member of the Iran-led "axis of resistance" to have kept a low profile during the crisis unleashed by Hamas's 7 October 2023 attack on Israel, while facing increased Israeli airstrikes on Iranian assets and allies inside the country. It has limited its public pronouncements to statements in support of the Palestinian cause and resistance to Israel, reflecting Syria's longstanding positions. Yet, while it praised Hamas's al-Aqsa Flood operation, it has taken no action to help the group or its other "axis" partners. The regime has not countered the Israeli airstrikes, and it has even engaged in discussions with Russia to reduce Iran-backed militia activities near the Syrian-Israeli border. It has, however, allowed those militias to keep using the regime's civilian and military facilities and infrastructure to supply their forces deployed in southern Syria.

[President Bashar al-Assad] has kept pro-Palestine demonstrations to a minimum.

On other fronts, the regime's actions have likewise belied its rhetoric. President Bashar al-Assad called upon the 51 national leaders at the Arab-Islamic summit in Saudi Arabia on 11 November to stop all political engagement with Israel, condition any resumption on Israel's commitment to halt hostilities and allow immediate aid into Gaza. But at home, it has kept pro-Palestine demonstrations to a minimum, requiring those hoping to organise them to obtain "security approval". It permitted a demonstration organised by Palestinian parties in Damascus on 14 October, but it disbanded the gathering when protesters became agitated. On 19 October, it allowed more demonstrations in several cities in regime-held areas, including a state-sponsored one in front of UN headquarters in Damascus.

As the conflict enters its fifth month, the main threat to Syria's stability stems from increased sparring between Iran-backed paramilitary groups and the U.S., which still has military personnel stationed in Syria. On 28 January, an armed drone launched by an Iraqi group, probably from a base in eastern Syria, hit Tower 22, a U.S. observation post on the Jordanian side of the border with Syria, killing three U.S. soldiers. The deaths may not have been intentional: the U.S. would normally have shot down such a drone but in this case misidentified the vehicle as one of its own. Washington ordered a series of retaliatory strikes in Syria and Iraq. A comparable miscalculation, handled with less dexterity, could trigger a more serious escalation.

Yemen

Like their Iran-backed counterparts in Lebanon and Iraq, the Houthis in Yemen, known as Ansar Allah, have responded to the war in Gaza by striking at Israeli interests. The Houthis have carried out rocket and drone strikes in the Red Sea and Gulf of Aden, initially on cargo ships with suspected links to Israel – meaning that the ships were thought to be either partly Israeli-owned or destined for an Israeli port. Later, according to the U.S., they expanded their set of targets to include other commercial vessels as well as U.S. warships. The Houthis have indicated that the attacks "will continue until the aggression in Gaza ends, the siege is lifted and food aid is delivered to northern and southern Gaza". (They also tried to reach Israeli soil directly with their missiles but proved largely incapable of doing so.)

In the face of these attacks, many shipping companies have opted not to send their vessels through the Red Sea, preferring the longer, and therefore costlier, route around the African continent. Those that have decided to hazard the shorter journey have found their ships vulnerable to attack. Houthi missiles and airborne, marine and submarine drones have caused significant damage to several vessels.

The Houthis' latest statements still identify ending the Gaza war as a main objective of their attacks.

The U.S. and UK, supported by other Western nations, have carried out repeated counter-strikes on the Houthis, targeting the group's coastal radar installations, unmanned aerial vehicles and surface vessels, weapons storage facilities, missile launch sites and other military assets in an attempt to degrade its ability to continue its attacks. This effort has yet to achieve its objective. At funerals for several fighters killed in these airstrikes, the Houthis have vowed to retaliate against the U.S. and UK. The Houthis' latest statements still identify ending the Gaza war as a main objective of their attacks but also speak of avenging their dead fighters.

On 17 January, the U.S. designated the Houthis as a Specially Designated Global Terrorist group in an apparent bid to convince them to halt their attacks on international shipping. From their side, the Houthis have downplayed the impact of sanctions that result from the designation.

The Houthis know their actions enjoy a measure of public support in Yemen, which helps them at a time when their rule in areas they control has become increasingly unpopular. Yemenis are broadly sympathetic to the Palestinian cause and sharply critical of Israel's assault on Gaza. Large demonstrations in cities – both inside Houthi-controlled areas and outside, such as in Taiz – attest to this widespread sentiment. As a result, the Houthis have been able to step up military recruitment in the areas they administer to help them in their struggle against Yemen's internationally recognised government and associated armed factions. The Houthis and their rivals have largely observed a UN-brokered truce since May 2022. The Houthis have also engaged in negotiations with Saudi Arabia about the latter's withdrawal from Yemen and the

start of follow-on intra-Yemeni talks. But they are likely building up their military strength to prepare for the time when the Saudi-led coalition will have withdrawn and the only enemies they will face are bickering government-aligned factions, in the hopes of dealing the latter a final defeat. They may also feel emboldened by the knowledge that no one will rush to their adversaries' aid, especially if doing so would come at the risk of further Houthi attacks on commercial shipping.

For now, Saudi-Houthi talks continue but appear no closer to a positive outcome than before 7 October. Importantly, though, they have not collapsed, either, mainly because of Riyadh's decision not to associate itself with the U.S. military confrontation with the Houthis. The longer the war in Gaza continues, however, the likelier that the political process will suffer and prospects for peace in Yemen – which depend not just on a Houthi-Saudi agreement but also on an intra-Yemeni deal – along with it. While the de facto truce has mostly held, low-level fighting has continued in some parts of the country and could escalate with renewed outside assistance. The U.S. and UK may broaden their attacks on the Houthis if the latter persist in targeting commercial shipping, but they and other foreign powers appear averse to moves that would bring renewed outside involvement and a resurgence of violence in the Yemeni civil war.

Iran

Since 7 October 2023, tensions have sharply increased between the U.S. and the "axis of resistance", the network of Iran-backed groups across the region. A deadly attack on U.S. forces in late January prompted significant retaliatory action in Iraq and Syria, while U.S. and allied forces are on a near-daily basis confronting the Houthis due to their threats to commercial shipping in the Red Sea and Gulf of Aden. Tehran appears to be walking a fine line between keeping up indirect pressure on its adversaries via its partners, while steering clear of provocations that run too high a risk of direct entanglement. Whether it can keep up this balancing act is unclear.

Iran's government portrays itself as a standard bearer of the Palestinian cause, and hostility toward Israel has been a core tenet of its ideology since the 1979 revolution. Though it disavowed any role in the 7 October Hamas attack, it praised the execution, and since then has denounced Israel's military campaign while urging a ceasefire. Tehran also hails attacks by members of the "axis of resistance", including Hizbollah in Lebanon, various groups in Iraq and the Houthis in Yemen, on Israel and/or U.S. targets. But while it backs these groups financially and militarily, conceding "common consultation", it denies directing their actions.

Despite, or perhaps because of, Iran's decades-long effort to keep the Israel-Palestine conflict at the centre of its foreign policy, popular sentiment appears to diverge from the official line. Though there is little by way of reliable polling or other systematic indicators, anecdotal evidence suggests that many Iranians have lost interest in the state's narrative of "support for the oppressed", which notionally underpins its support for the "axis" groups. A backlash may even be emerging. The slogan "No Gaza, no Lebanon, I give my life for Iran" has resounded at

several of the recurrent anti-government protests driven by political and economic discontent, reflecting a conviction that the government gives greater priority to advancing its regional agenda than to meeting pressing domestic needs.

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The few demonstrations in support of Palestine that occur are more likely orchestrated from above than at the grassroots, as seen in many Western capitals; as one commentary in the reformist-leaning *Sharq* newspaper put it, "below the surface, there is no movement to be seen". But regardless, even if there is public apathy toward or outright criticism of the government's approach, it is unlikely to shape the behaviour of decision-makers, who weigh their policies primarily on the basis of their perception of Iran's ideological and strategic benefit.

Iran is involved in two distinct but intertwined conflicts related to Gaza. The first is a function of its longstanding support for Hamas and Palestinian Islamic Jihad in the strip, along with Hizbollah in Lebanon. Tehran favours containment of the tit-for-tat exchanges across the Israeli-Lebanese border, given Hizbollah's centrality to Iran's regional power projection and "forward defence" strategy. All-out confrontation would force Tehran to decide whether and how to enter the fray in support of Hizbollah, which it sees as key to its ability to deter Israel from striking Iran. As for Hamas, Iran would portray anything less than a complete Israeli dismantling of the movement as a victory.

No less salient are the frequent confrontations since mid-October between Iran-backed groups in Syria, Iraq and Yemen, on one side, and the U.S., Israel and allied forces, on the other. These have trended in an increasingly worrying direction, notably after U.S. forces suffered three fatalities in a 28 January drone attack on an observation post in north-eastern Jordan. Washington expanded its strikes on Iran-linked forces and facilities in Syria and Iraq, while also hitting Houthi targets in response to the Yemeni group's attacks on shipping in the Red Sea and Gulf of Aden. Having built up a network of local allies over decades, Iran maintains that these groups operate autonomously; the U.S. and its allies counter that Tehran is, at a minimum, facilitating their actions and supporting them with intelligence, funding and weaponry.

While neither Washington nor Tehran appears keen to escalate toward a direct confrontation, risks are significant. The Biden administration already faces domestic calls to strike Iranian targets directly, and additional attacks in Iraq or Syria resulting in significant U.S. casualties would ratchet up such pressure further. Media reports suggest that Iran has leaned on some allied groups to restrain their attacks in recent weeks, but it remains unclear if the Islamic Republic has either the ability or inclination to rein in its partners, not least as it continues to

give them military assistance and intelligence. Prior to 7 October, the U.S. and Iran appeared to have agreed on an informal de-escalatory understanding while continuing political talks, which the unexpected Hamas attack in Israel disrupted. Today, they may well both want to return to the pre-7 October status quo as a way to give negotiations another chance, but they seem unable to do so short of an end to the war in Gaza. As an acceptable fallback, they both appear to be trying to keep within enemy red lines while conveying their own messages as to what would prompt a greater escalatory response. This manoeuvring may keep them from crossing a threshold toward direct confrontation but leaves considerable room for turmoil below it. Whether the two sides will avert a collision is hard to predict: a high-casualty incident could force one or both to change tack, especially if domestic audiences demand retaliation.

Gulf Arab States

As the Gaza war drags on and regional tensions continue to rise, Gulf Arab states are split in their response. The UAE and Bahrain, which normalised relations with Israel, and Saudi Arabia, which is considering doing so, are trying to walk a fine line between condemning the Israeli leadership in response to public outrage while also not jeopardising their delicate relations with the Jewish state. By contrast, Oman, Qatar and Kuwait have been explicit in their condemnations of Israel's conduct in the war. While all these members of the Gulf Cooperation Council (GCC) have made calls for a Gaza ceasefire, until recently they have done little to coordinate efforts to bring the war to an end, each instead working separately.

Since 7 October, sentiment throughout the Gulf region has reflected deep anger at Israel for its war in Gaza and at the U.S. for failing to restrain Israel. Anti-war protests broke out in Oman, Kuwait and Bahrain in the immediate aftermath of Hamas's attack. In Bahrain, peaceful, small-scale marches have continued almost weekly, focused strictly on Gaza and shying away from airing domestic grievances. Here and in many other countries with regimes that actively discourage public expression of discontent, many people have taken to social media and are participating in boycotts of businesses that have links to Israel, through investments, ad campaigns or otherwise, to express support for Palestinians.

In Oman and Qatar, political and religious elites have been in tune with public sentiment against Israel and in support of Palestinians.

In Oman and Qatar, political and religious elites have been in tune with public sentiment against Israel and in support of Palestinians. Omani officials, including the grand mufti, made strong statements, calling out Arab states for remaining idle while Gaza is under siege, celebrating the Houthis and their attacks in the Red Sea, and condemning U.S.-led airstrikes on Houthi military sites in Yemen. Oman's foreign minister advocated for an international conference that would advance recognition of a Palestinian state and emphasised

the importance of including Hamas at the table. As for Qatar, its leader, Sheikh Tamim bin Hamad Al Thani, in a speech before the GCC summit in November described Israel's Gaza campaign as a "genocide" and censured external powers for allowing it to continue.

Qatar, in particular, has played a prominent role in trying to bring the war to an end, mediating between Israel and Hamas to reach a ceasefire. Working alongside Egypt and the U.S., it brokered a week-long humanitarian pause at the end of November in a deal that saw an exchange of hostages and prisoners while sending medicines to hostages and humanitarian aid into Gaza. Since then, it has been intermittently involved in negotiating a longer ceasefire that would, in three stages, see the release of all or most remaining hostages in exchange for large numbers of Palestinian prisoners held in Israel, a significant increase in humanitarian aid and at least a partial withdrawal of Israeli forces from Gaza. In February, Israeli Prime Minister Netanyahu criticised Qatar for failing to secure the release of Israeli hostages when, he claimed, it was in a position to pressure Hamas, whose political leadership has been hosting in Doha. Qatari officials countered by accusing Netanyahu of trying to prolong the war in pursuit of a narrow political agenda of his own – a reference to the Israeli prime minister allegedly trying to avoid having to appear in court on bribery charges by hanging on to his job.

In the UAE and Bahrain, pressure to cut economic and political ties with Israel continues to rise. In Bahrain, it has split elites: even as security forces arrested several protesters, the country's council of representatives voted to recall its ambassador from Israel (King Hamad bin Isa Al Khalifa subsequently declined to do so), sever economic relations and join South Africa's landmark case against Israel at the International Court of Justice. Nevertheless, the Bahraini and Emirati leaderships have both stated that they intend to keep their links with Israel – pursuant to the 2020 Abraham Accords – in place.

The UAE has been walking on eggshells in maintaining its lucrative ties with Israel in the face of mounting public fury and heightened scrutiny.

The UAE has been walking on eggshells in maintaining its lucrative ties with Israel in the face of mounting public fury and heightened scrutiny. In a departure from its usual position, it has allowed a degree of criticism of Israel on social media, even by Emirati academics with sizeable followings. Abu Dhabi has provided food and medicine to Gaza and evacuated injured civilians, arguing that its relationship with Israel allowed it to build a humanitarian corridor. It also has constructed a field hospital, as well as a desalination plant at the Rafah border crossing with Egypt to pump clean drinking water into the territory. Using its seat on the UN Security Council, which it held until the end of 2023, the UAE pushed through a resolution calling for an increase of humanitarian aid to Gaza and protection for those delivering it. The UAE has also quietly backed Mohammed Dahlan, a Palestinian former security chief from Gaza, who some see as a possible successor to Abbas.

For its part, Saudi Arabia has generally kept a low profile for the past four months, focusing on diplomatic efforts to end the war, including attempts to coordinate Arab approaches. It hosted an Arab-Islamic summit in Riyadh in November and took an Arab delegation around the capitals of UN Security Council member states to push for a ceasefire in Gaza. It also hosted, in February, the foreign ministers of Egypt, Jordan, the UAE and Qatar to discuss how to jointly work toward a ceasefire, and has been involved in talks about the "day after" for Gaza, meeting with Jordanian, Egyptian and Palestinian Authority officials about revitalising the PA.

For Saudi Arabia, normalising relations with Israel remains on the table despite the war in Gaza, though Riyadh does not appear to be in a rush, despite Washington's belief that progress on this track could not just end the Gaza crisis but also move Israel and the Palestinians toward a two-state solution. If before 7 October Saudi Arabia, keen to extract critical security benefits from the U.S., seemed well on its way toward that objective, but apparently without a hard condition on Palestinian statehood, the Gaza war has brought the Palestinian issue to the front of Saudi demands, at least in rhetoric. Riyadh appears still open to the idea but, fortified by the public outcry against Israeli actions in Gaza, it is making clear that normalisation could happen only, as per a 7 February foreign ministry statement, after "an independent Palestinian state is recognised … and all Israeli occupation forces withdraw from the Gaza Strip". It is difficult to gauge how firm this demand is, and whether in the Saudi view states could recognise a Palestinian state before it exists on the ground, but for now it provides a lever in negotiations with, especially, the U.S. To Riyadh, the creation of a viable Palestinian state also fits within the framework for regional peace and integration that it needs to deliver socio-economic gains consistent with its Saudi Vision 2030.

As hostilities have spread in the region, the Gulf Arab states, with the exception of Bahrain, have resisted calls to join U.S.-led military efforts to fight the Houthis in Yemen out of concern they could become a target amid wider escalation. Riyadh and Abu Dhabi seem to believe that their engagement with both Iran and, in the Saudi case, the Houthis will protect them to a certain degree, while the Houthis have said their attacks on shipping in the Red Sea and Gulf of Aden are not intended to undermine their talks with Saudi Arabia, but are focused strictly on pushing for a Gaza ceasefire. Yet, because the Houthis have targeted both Saudi Arabia and the UAE in the past, the UAE and possibly other Gulf states have reportedly told the U.S. it cannot use their countries to launch strikes on Iran-backed groups; the U.S. has military bases in all six GCC states.

Saudi-Iranian and Emirati-Iranian efforts at rapprochement appear not to have suffered during the Gaza war. High-level meetings, notably between Saudi and Iranian security officials, have picked up pace over the last few months. Such progress suggests that Riyadh and Abu Dhabi see stronger relations with Iran as an insurance policy protecting them from becoming targets in a confrontation between the U.S. and Iran and/or Iran-aligned groups. Both benefit also in the sense that they believe that diplomacy with Iran will foster a more stable regional environment that can support their ambitious economic transformation and growth objectives. Arguably, it is these relationships that have helped prevent the exchanges of fire in the region from also

hitting Gulf countries. Local mishaps, like an escalation of the conflict in Yemen and a resumption of Houthi cross-border attacks in Saudi Arabia, would reverse the trend. Riyadh and Abu Dhabi would almost certainly assume that Tehran had greenlighted these attacks, jettisoning the notion of rapprochement in pursuit of overriding strategic interests closer to the Mediterranean. For now, though, the Houthis also appear to value keeping their line of communication to Riyadh open, so that they can be sure not to rekindle their conflict with Saudi Arabia.

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